DOCUMENT RESUME

ED 278 435 JC 870 052

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TITLE Organizational Models of Successful Advancement Programs.
PUB DATE Dec 86
NOTE 32p.; Paper presented at the Annual Conference on Advancing Two-Year Institutions of the Council for the Advancement and Support of Education (3rd, Alexandria, VA, December 9-11, 1986).
PUB TYPE Guides - Non-Classroom Use (055) -- Speeches/Conference Papers (150)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Administrative Organization; Community Colleges; *Fund Raising; *Institutional Advancement; *Organizational Effectiveness; Organizational Objectives; *Private Financial Support; Program Administration; Surveys; Two Year Colleges

ABSTRACT

A study was conducted to determine the organizational factors that were consistent with the success of two-year colleges in obtaining private financial support. Informal telephone surveys were conducted with 15 community colleges with successful endowment and fund-raising programs to gather information about organizational structures and factors promoting or inhibiting success. Top-rated considerations in college development were the involvement, attitude, and access of the college's chief executive officer; the reputation of the institution; the structure and activity of the board; and the talents of the development officer. Although the majority of the advancement offices used the centralized "Line Model" of organization and included a broad range of advancement activities among their functions, many operations succeeded well using the "Staff Model" and decentralizing traditional functions over several institutional areas. Study findings as well as guidance found in the literature provide support for the following management principles: (1) the chief advancement officer must report to the president of the institution; (2) the president must be accessible, available, and active and enjoy the advancement role; (3) a strong, active and carefully selected board of trustees is necessary to the functioning of the development effort; (4) a strong, positive institutional reputation is essential; and (5) a talented and energetic advancement officer is critical. Information on the endowment market values of two-year institutions, annual gift support, organizational models, and survey findings are appended. (EJV)

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ORGANIZATIONAL MODELS OF SUCCESSFUL ADVANCEMENT PROGRAMS

Prepared for the
CASE Advancing Two-Year Institutions Conference
December 11, 1986, Alexandria, VA

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Vice President for Development
Edison Community College
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JC 870 052

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Two-year institutions are a relatively new priority of the Council for Advancement and Support of Education. Since the merger of the old American College Public Relations Association (ACPRA) and the American Alumni Council (AAC) in the mid-1970's, those of us working to advance the junior sector of higher education have encouraged our colleagues to take an active role in CASE. We recognize that we have a lot to learn from our senior colleagues, and have felt that CASE has much to gain from greater involvement of the 1,200 community and junior college professionals in the advancement sector.

The fact that we are here is testimony to the commitment CASE has made to us. From a small gathering in St. Louis in 1979 that attracted a handful of two-year college people, to these dual-focus conferences here this week, represents a quantum leap for our professional development.

Two-year colleges are also becoming more active in the advancement business. During the sixties and seventies, students just came; veterans' benefits paid the bills; federal student aid encouraged enrollments; guaranteed student loans took care of the rest. Now, as we look toward the nineties, veterans are a rarity; federal student aid is decreasing; student loan funds are scarce, and two-year colleges have hit the trail, recruiting students and funds.

At that St. Louis meeting eight years ago, the term "marketing" would have been seen as undignified and totally inappropriate for academe. "Fund-raising" was generally cloaked in the euphemism "resource development."

Today "Institutional Marketing" is one of the hottest topics on the conference circuit among two-year and four-year advancement persons. College foundations as vehicles for private fund-raising are multiplying daily in institutional advancement. Professionals who have expertise in putting together marketing plans or college foundations are in great demand as consultants and speakers.

Concrete evidence of the growth in interest in fund-raising is found in the latest Voluntary Support to Education, published by CFAE and CASE, which indicates that two-year public colleges' fund-raising for 1984-85 represented a 78.4% increase over the previous year - by far the fastest-growing sector of higher education in private resource development.

More and more colleges are looking toward the CFAE reports to find models. Those fortunate enough to have endowments listed among the top

performers receive inquiries from every corner of the nation asking for keys to success.

SUCCESS: EVERYBODY WANTS IT, BUT DO WE KNOW WHAT IT IS? Researchers and practitioners in the advancement business differ in their definitions of "success" as applied to development or advancement.

Success may be gauged in the publications area of advancement by the number of medals received in the CASE recognition program. Success in student recruitment marketing may be determined by the numbers of new students attracted to the institution. Alumni affairs success may be judged in the percentage of eligible alumni who become dues-paying alumni members.

The definitions become a bit hazier when applied to the fund-raising area of advancement. Some authorities guage success by the dollar value of the invested endowment; others define it by the numbers of gifts received. Silvera in his 1976 study of California colleges suggested it is the amount of money raised per FTE of college enrollment. Sharron suggests success may appropriately be seen in the community involvement and advocacy generated by development efforts. Luck and Tolle, in their 1978 study, postulate that success may best be evaluated by the programs made possible by the development effort.

For purposes of this presentation we have chosen to concentrate on the private fund-raising aspects of advancement, and have adopted the simplest definitions. We have identified the ten private and ten public colleges with the greatest endowments, and the ten each with the greatest total support for the year covered in the report (Tables 1 and 2.) As demonstrated in Table 2, the giant Miami-Dade Community College claimed top position among public colleges based on its two-million-plus total. Had we used Silvera's formula to define success, small Roxbury Community College with its 999 students would claim the "most successful" position because of its per-FTE gifts of $834, but private colleges such as Faulkner in Alabama would dwarf even that with their multi-thousands-per-FTE amounts.

But we are dealing here with the top endowments and top dollar producers among the colleges that reported to CFAE and CASE. And let me suggest that two-year people are very lax in reporting; only 15% of our colleges respond, as opposed to 57% of our university brethren. We need to encourage greater participation and accuracy in this study; it's the only standard yardstick we have at this point to measure our fund-raising performance.

When Bremer made a study of higher education fund-raising in 1965 he identified the Middle Atlantic States as the most successful geographic area in the nation. For two-year colleges, at least, these two tables suggest this has shifted to the south and west, and that if you really want to assure your success in development you might want to consider moving to the Sun Belt - optimally North Carolina - and getting a job with a private college, preferably one affiliated with the Presbyterian Church.

WHAT DO WE HAVE TO DO TO GET IT? To get some idea of what organizational factors seem to be consistent with success in two-year college development, we conducted an informal telephone survey of 15 of the top colleges in these lists. We asked their advancement officers to describe their organizational structures, and to discuss factors associated with success as well as organizational inhibitors to achievement.

This bar graph (Table 3) illustrates four rather distinct groups of responses which have been converted to percentages based on the frequency and degree of importance placed by the officers.

In what we could call the "A" group are universally-cited top considerations. These concern the involvement, attitude and access of the college's CEO; the reputation of the institution; the structure and activity of the board, and the talents and energies of the development officer - which this group surely sees as critical!

In the "B" group are other factors relating to development office organization, marketing, asset management and programs for donor recognition.

The "C" group involves organizational factors such as vehicles for involvement of volunteers, faculty and alumni, and provision for grants and donor research, planned giving programs and professional development.

A number of respondents were critical of both CASE and NCRD as providers of two-year college professional development. CASE is highly regarded for the quality of its publications and programming, but there were suggestions that more publications and sessions should be provided specifically by and for two-year college professionals. NCRD, on the other hand, does maintain a two-year institution focus but was chided for its continued emphasis on public sector resources.

There were some significant differences in the typical responses of private and public colleges. Although the "A" group was identical among both types of colleges, it was interesting that alumni programs were dead last in importance to public institutions but moved up to the middle of the list for private colleges. This may be due to the fact that private colleges rely to a greater extent upon alumni for their pools of future students, and that loyal former students are their focus for fund-raising rather than the community at large as with public colleges.

Also, private colleges gave significantly more weight to the value of investment management than public colleges. This might be attributed to the fact that private colleges are dependent upon investment income for their existence to a far greater extent than public, and thus they have become more acutely aware of even small differences in total rate of return.

GETTING OUR ACT TOGETHER, AND TAKING IT ON THE ROAD: Now that we know some of the factors that are critical to successful institutional advancement, we can discuss some typical models that are in use.

The concept of institutional advancement as a comprehensive higher education discipline first emerged at the historic Greenbrier Conference sponsored in 1958 by ACPRA and AAC. The conference report strongly endorsed gathering the functions under one executive office. Since that time colleges and universities have experimented with hundreds of variations and models to meet the needs in different institutions.

Duffy, in his 1979 study of successful two-year college foundations, found that the organizational model selected should provide for adequate planning, communication and motivation.

Shea describes two basic organizational models; one is the centralized, in which functions traditionally considered "advancement" or "development" are grouped under one supervisor who reports to the president. In the second or noncentralized model, the functions may be spread over several other areas of the institution or may have as many as four administrators reporting to the president or designees. (Table 4.) In our survey of successful programs the centralized model prevailed, although one-fourth of the colleges did indicate two or more of the advancement disciplines reporting directly to the president through separate director-level professionals.

Concerning placement of the advancement function in the institutional structure, there are likewise two major models, each of which may be centralized or noncentralized. First is the "Staff Model," (Table 5); this is an outgrowth of the traditional philosophy that the president of the college is the chief advancement officer, as reaffirmed by Fisher in 1980. The Staff Model extends that philosophy to view the advancement function as an adjunct of the president's staff to implement the president's policy.

Many enlightened presidents are now realizing that the support of other areas of the institution is essential to advancement success, and that the college needs to view the advancement function in the mainstream of college life. This model assumes advancement is a necessary and legitimate part of the college and not just a "nice-to-have" project off to the side. It further views advancement officers as professionals in highly-specialized disciplines who are themselves creative innovators, competent to collaborate in governance of the institution and not merely to implement programs planned by others.

This "Line Model" (Table 6) places the advancement function on the line with directors of other essential college functions. Most frequently there are four - headed by a Vice President, Dean or Director - including academic affairs, student services, and administrative or business services, plus advancement or development. This model affirms that the institution considers advancement an essential component of college operation and not a "frill" or accessory. Interestingly, private colleges, to whom private funding is most critical for continuing existence, have pioneered in this model. In a number of colleges, a fifth area is added - Church Relations, Planning, or some others that do not seem to fit neatly into the other four categories.

Whatever the placement of the fund-raising function within the organization, and whether it is centralized or not, Evans states the organization should facilitate three main functions: Finding the money - providing a system for donor research and identification; obtaining the money - actually matching up needs with potential donors, asking for and receiving the gift; and following up by recording the gift and keeping adequate records.

I would add a fourth factor, that of properly recognizing the donors. We have all heard that the best prospect is someone who has given to you before. But we need to expand that to include "someone who has given to you before - and feels good about it." One donor who feels unappreciated, or unrecognized, or neglected, can outweigh the benefits of a dozen new donors. In today's market there is too much competition for the gift dollar to risk losing future gifts through lack of attention to current donors.

In two-thirds of the colleges surveyed, College (or Institutional or Public) Relations is incorporated as a part of the comprehensive advancement area. My personal philosophy is that this is essential, as an effective PR program is a sine qua non of successful fund-raising. (Remember "Institutional Reputation" was number two among those success factors in Table 3.) And good PR is also one of the valuable by-products of good fund-raising programs. To separate marketing, publications, PR and fund-raising is to fragment institutional resources and minimize the benefits that can be gained through the interplay of these programs.

Marketing the fund-raising programs is vital, and it is here that close cooperation and a daily working relationship with College Relations become crucial. Donor recognition also frequently requires publicity. With local newspapers most often becoming parts of large national publishing chains and losing local news space, colleges are no longer able to depend on the daily paper to publicize even major gifts or special events. Working with college publications to feature news of donors and new programs is, we believe, essential to a favorable donor climate.

Our college adopted the centralized Line Model during a reorganization in 1980, with an executive vice president and four vice presidents who function as the president's cabinet. We describe our Development Area as the one that develops all types of resources for the institution. As seen on Table 7, we include development of community and internal support through the College Relations function, development of staff and college programs through SPD (many times in concert with grants and foundation programs), development of state level support through legislative information activities, development of advocates and financial resources through the foundation, and coordination of public sector resource development. This program is implemented with five FTE staff members.

The size of the development staff is apparently not of itself a predictor of success of the program. The survey indicates that staffing of

advancement offices varies considerably, seemingly correlated more closely to the size of the institutions than to the success of programs.

Small colleges surveyed (less than 7,000 FTE) were more likely to have comprehensive advancement offices with an average of 3.2 professionals responsible for institutional relations, public and private grants, alumni/parents, foundation and generally at least one other area, supported by an average of 2.8 clerical employees plus student help. Large colleges typically reported one or more professionals, generally directors and assistant directors, for each major function, each backed by at least one support staff member or the equivalent.

Table 8 illustrates how a foundation can be organized. The boxes shown represent functions. A total of 1.75 FTE paid staff members operate this foundation, and provide support services needed by the board members and volunteers who work on committees and task forces. Several authorities have cited the principal job of the Executive Director as being the "arms and legs" of the board members - to keep them informed, motivated, and supplied with whatever they need in order to function as directors, committee chairs and members.

Every foundation wants the type of foundation president we have - a person who believes totally in the college and the foundation, who is its hardest worker and greatest advocate, and who will do whatever needs to be done with no expectation of reward except satisfaction. But the implications for organization is clear; staff must be prepared to drop everything to lend support and "load ammunition" for the volunteer president whenever asked. Staff must be available to do research, provide accurate reports, get personal letters into the day's mail, follow up contacts the president has made, or change plans and accompany the president to a meeting in another city on a hour's notice. Organization and staffing must provide for this type of flexibility and capability.

One question most frequently asked is how college trustees and foundation directors interface. We have adopted the philosophy that although the foundation should operate at an "arm's length" relationship with the college, there should be coordination and communication between the two bodies. We have structured the foundation board of directors to include 15 community members (five elected each year to three-year terms), two college administrators (the President and Vice President for Development) and one college trustee from each of the five counties served by the college. This insures that the community members will sense a real responsibility for the foundation, and not feel they are being used as "rubber-stamps" or tools of the college trustees or administration. The community experience, expertise and wisdom gained for the foundation is incalculable; the board is involved, attends and participates and accepts responsibility for the foundation's progress.

SUCCESS INSURANCE AND QUALITY ASSURANCE: The "arm's length" relationship is maintained with foundation business to the extent that the college attorneys, business office and investment services are kept totally apart from the foundation.

Florida law has categorized our foundations as Direct Support Organizations to community colleges and universities, authorizing the use of college office space, personnel, equipment and supplies. However, our foundation reimburses the college for a substantial percentage of foundation personnel costs, and also has purchased all computer, word processing and other office equipment for the development area. This has been done at the insistence of the foundation board to perpetuate the feeling that the foundation is not a burden to the college operating budget, that it provides for itself and maintains the "arm's length" relationship.

Continuing this philosophy, the foundation retains a CPA firm for bookkeeping, annual audit and tax returns preparation. No foundation financial business is shared with the college, except when the annual financial report is provided the college trustees each year as mandated by state law.

The Investment Committee of the foundation monitors asset management, and every three years invites proposals for investment management services. It has progressed through the use of a bank trust department, then management by a large national investment firm, and now uses The Common Fund almost exclusively. The board has been well satisfied with the total yield on our portfolio of cash, equities and bonds which last year averaged 30%.

As indicated on Table 9, 20% of the colleges surveyed use The Common Fund, a not-for-profit investment management service set up specifically to meet the needs of educational institutions; another 30% have their assets managed by a local bank, and the remaining half have investment committees who make the individual investment decisions themselves.

A major problem identified by advancement officers, particularly those with public community colleges, is their boards' reluctance to consider outside investment management, regardless of how lacklustre the local managers' performance may be. There is a mentality that initially dictates keeping the money in the community from which it has come. Our foundation went through this phase, but the board members grew through the process to the point that they recognized their fiduciary responsibility required the best investment decisions possible - regardless of local ties - in line with the "prudent man" concept. (You may be able to use the Biblical "Parable of the Talents" to good advantage with your board, if this is a problem on your campus.)

Survey responses to questions about legal, accounting and investment management differed markedly between public and private institutions. In most cases, private colleges are themselves generators and users of the funds; their trustees not only make policy for the colleges but also are themselves the leaders in development. They are frequently selected for their abilities to make gifts themselves and to elicit gifts from their peers. In most private institutions surveyed, all gift and endowment accounting is done by the college comptroller or business office, legal services are provided by the college attorney, and investments are monitored by the college trustees.

During our interview process, we asked the advancement officers what changes in organization they feel would make their programs more efficient or effective. Table 10 indicates the overriding concern is the need for more support staff to attend to critical paperwork involved in advancement, to assure timeliness and accuracy.

Next, reflecting perhaps the concerns brought about by tax reform, was expressed a need to add a person to implement a broader planned giving program. Three-fourths of the officers surveyed expressed the need for broadened deferred gifts emphasis including programs with attorneys and accountants, formal insurance plans and projects to involve potential planned gifts donors, but cited inadequate staff time as the current inhibitor. Several respondents from public colleges commented that most bequests realized in the past have been "accidental" - unsolicited, based on institutional reputation, personal experience with the college or attorney support.

More time for personal contacts emerged as a third need, with computerization of the advancement area listed fourth. External investment management and strengthened donor and grants research tied for fifth place.

Of the colleges with successful endowments (Table 11) 40% of respondents stated they had built their endowments mainly through gifts from bequests or trusts. About 30% credited their success mainly to gifts from living individuals, and corporate gifts led in about 20% of cases. Foundation gifts were paramount to the success of only 10% of the endowments.

SO IF AT FIRST YOU DON'T SUCCEED, there are many other models and other ways to organize. Although the majority of the successful advancement offices utilize the centralized "Line Model" and include a broad range of advancement activities among their functions, many operations have succeeded well using the "Staff Model" and decentralizing traditional functions over several institutional areas.

There are, however, some universal truths that should be reviewed:

1. First, the chief advancement officer must report to the president of the institution.

2. The president of the institution must be a "triple-A" leader where the advancement program is concerned; he or she must be <u>accessible</u>, <u>available</u> and <u>active</u>, and must enjoy the advancement role.

3. A strong, active and carefully-selected board of trustees or directors is necessary to the functioning of the development effort. The board is no place to balance, compromise or reward persons for favors or past service; each member must be selected because of particular expertise, community position, ability to give, and willingness to ask his or her friends and associates for their support.

4. A strong, positive institutional reputation is essential if the

advancement efforts are to be successful; paraphrased, the product must be good if it is to sell. (Remember the business about the sow's ear.)

5. A talented and energetic advancement officer is essential.

We have said little about us, the advancement officers in this organizational scheme. We - these people - must be equally comfortable having coffee in the student center, meeting in the corporate boardroom, lunching at Rotary or having tea in the drawing-room with a 94-year-old donor.

Successful advancement officers are professionals who are conversant in a wide range of areas, from geriatric psychology to estate law and accountancy. We are persistent and assertive and positive, and are always humble and self-effacing. Advancement officers are totally open, yet are enigmas - realists, visionaries, pragmatists and always optimistic.

We are well organized, articulate, souls of tact and diplomacy. We are able to write a speech on a moment's notice for the college or foundation president (and even deliver the speech, if need be), and must be able to placate the irate donor whose car is ticketed by the campus police. Successful advancement officers always remember donor birthdays and the names of grandchildren and pets.

We are comfortable in blue jeans and checked shirts, riding in a land rover and exclaiming over the sections of land owned by a proud rural donor; conversely, we must have a dinner jacket or dress ready at all times for dinner at the club - and be able to distinguish readily between escargot and escarole.

Successful development officers are dynamic, creative leaders, always relaxed and without tension, yet who thrive on crisis and deadlines with never a display of temperament.

Advancement offices are neat, orderly, tightly structured, and infinitely flexible. Other areas of the college never know what advancement offices do, except that their staffs go about some very mysterious business with a great deal of good humor.

Advancement officers work and research for weeks to prepare for a casual lunchtime encounter with a possible donor. We make dozens of calls and contacts to plan a purely accidental meeting with another potential giver.

We keep regular working hours - fourteen-hour days and no more than two days on weekends; we are always positive, rested, cheerful and ready for new challenges on Monday mornings.

Advancement officers are well-educated with advanced degrees, but are always deferential to the faculty and deans in matters intellectual. We are self-confident and self-assured, yet

possess no ego. We understand the big picture, but are detail-oriented, seeing that all bases are covered, that all eventualities have been anticipated, and that the results appear absolutely effortless.

We stand ready to accept responsibility, apologize if necessary, and make things right when they've gone wrong.

When things go exactly right and turn out well, successful advancement officers give full credit to the board, the donors, the president, the volunteers, or the staff.

We hope this session has helped to assure that things will go right with your institutional advancement program as you plan for the future.

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Table 1

U. S. TWO-YEAR INSTITUTIONS
ENDOWMENT MARKET VALUES
Based on Voluntary Support of Education, 1984-85

Public Colleges

1.	Edison Community College, FL	6,233	$2,545,567
2.	Miami-Dade Community College, FL	37,370	$2,517,690
3.	Lorain County Community College, OH	6,495	$1,631,127
4.	Harrisburg Area Community College, PA	3,875	$1,345,849
5.	Sandhills Community College, NC	1,984	$1,227,864
6.	Paris Junior College, TX	2,175	$1,196,567
7.	Monroe Community College (SUNY) NY	11,686	$1,182,011
8.	Montgomery County Community College, PA	7,200	$ 710,000
9.	Pasco-Hernando Community College, FL	2,800	$ 644,866
10.	Dallas County Community College, TX	76,917	$ 499,575

Private Colleges

1.	Peace College NC (Presbyterian)*	454	$11,217,448
2.	Midway College, KY (Disc. of Christ)	314	$11,022,049
3.	Peirce Junior College, PA	1,492	$ 7,312,146
4.	Academy of Aeronautics, NY	1,485	$ 6,234,037
5.	Lees-McRae College, NC (Presbyterian)	671	$ 5,224,366
6.	Bay Path Junior College, MA	702	$ 4,673,352
7.	Lasell Junior College, MA	453	$ 3,895,924
8.	Dean Junior College, MA	2,318	$ 3,736,980
9.	Cazenovia College, NY (Methodist)	809	$ 3,464,863
10.	Chowan College, NC (So. Baptist)	954	$ 3,351,210

* - Church affiliations are shown for private colleges; colleges stress they are "church-affiliated" rather than "church-supported."

U. S. TWO-YEAR INSTITUTIONS
ANNUAL GIFT SUPPORT
Based on Voluntary Support of Education, 1984-85

Public Colleges

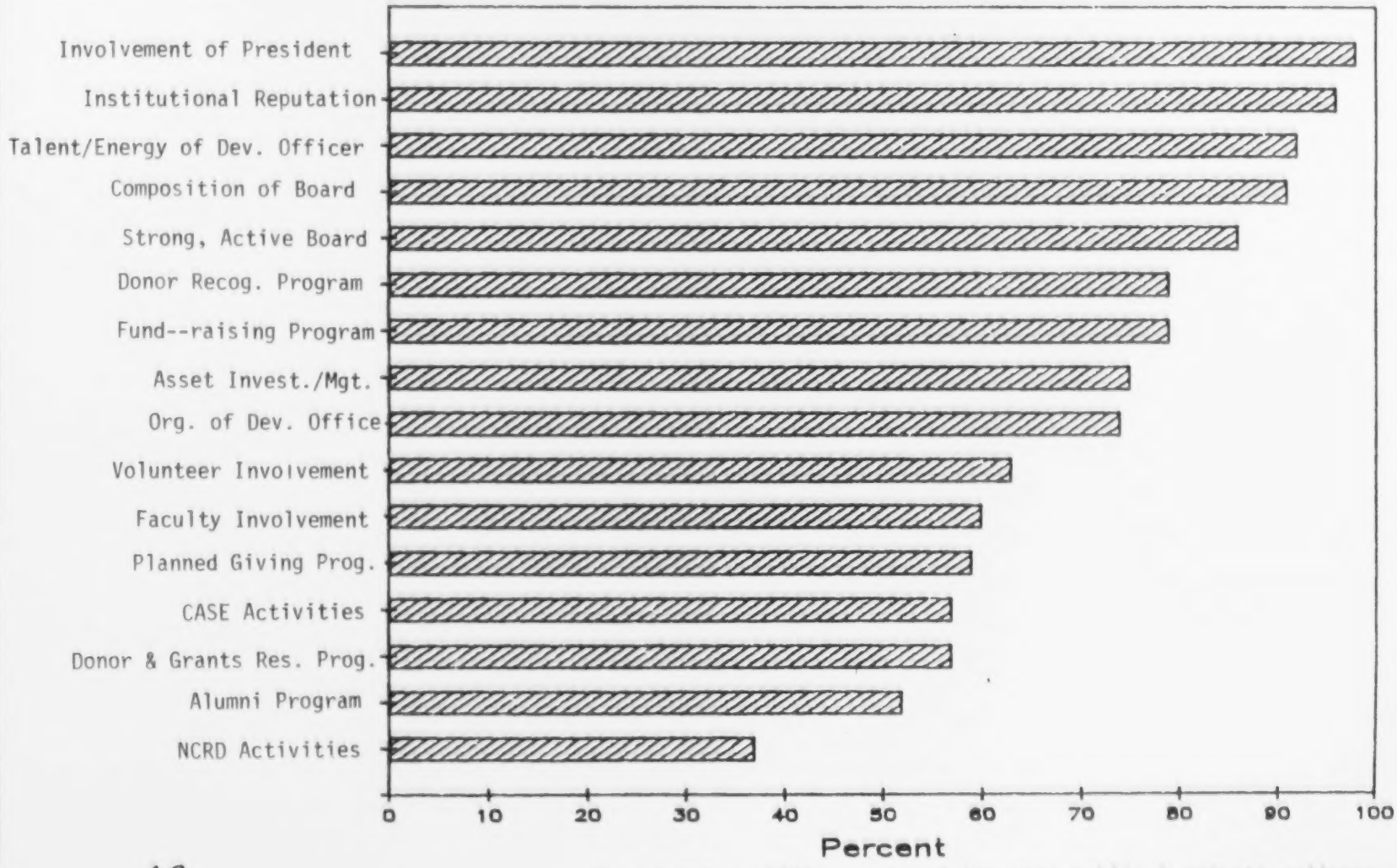
1.	Miami-Dade Community College, FL	37,370	$ 2,229,952
2.*	Dallas County Community College, TX	76,917	$ 924,001
3.	Roxbury Community College, MA	999	$ 833,948
4.	Washington St. CC Dist.(Spokane) WA	13,982	$ 668,278
5.	Edison Community College, FL	6,233	$ 650,550
6.	Triton College, IL	25,000	$ 600,000
7.	Williamsport Area Comm. College PA	3,576	$ 560,241
8.	Harrisburg Area Comm. College PA	3,875	$ 520,930
9.	Monroe Community College (SUNY) NY	11,686	$ 519,522
10.	College of Marin, CA	7,016	$ 465,566

Private Colleges

1.	Faulkner University, AL	1,544	$ 1,785,896
2.	Chowan College, NC (So. Baptist)	954	$ 1,621,004
3.	Montreat-Anderson College, NC (Presby.)	379	$ 1,407,414
4.	Lees-McRae College, NC (Presbyterian)	671	$ 1,390,235
5.	North Greenville College, SC (Baptist)	529	$ 1,270,847
6.	Hilbert College, NY	734	$ 1,165,829
7.	Louisburg College, NY (Methodist)	777	$ 1,149,194
8.	Mount Olive College, NC (Baptist)	675	$ 1,031,743
9.	Central College, KS	273	$ 1,020,353
10.	Waldorf College, IA (Lutheran)	460	$ 988,289

* - In the CFAE report, College of San Mateo, CA, was shown in the #2 position; institutional spokesperson said reported data was erroneous, however, representing not private gifts but federal and state grants.

FACTORS CREDITED WITH SUCCESS OF COLLEGES' ADVANCEMENT PROGRAMS

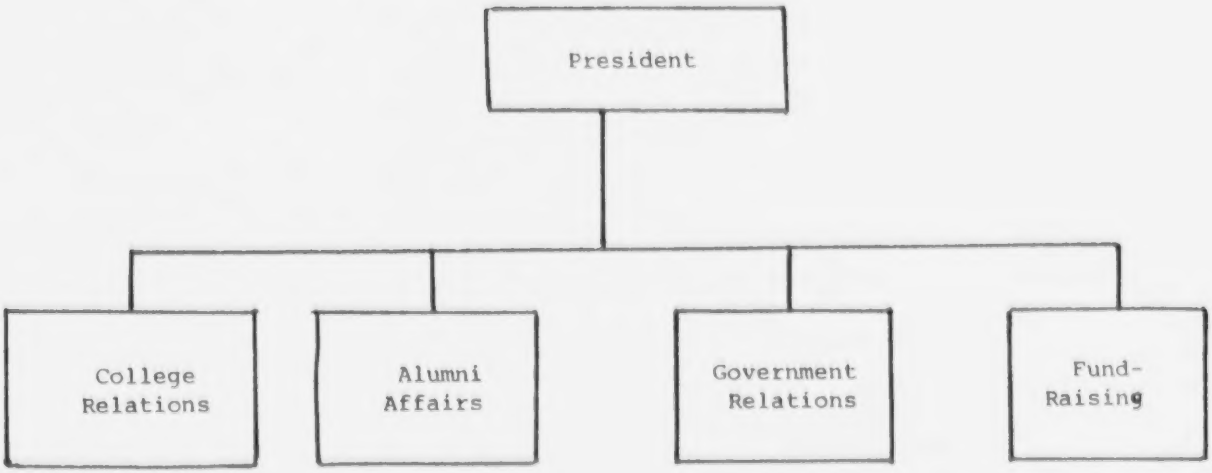


From October, 1986, survey of two-year public & private colleges

Table 3

NONCENTRALIZED ORGANIZATION MODEL

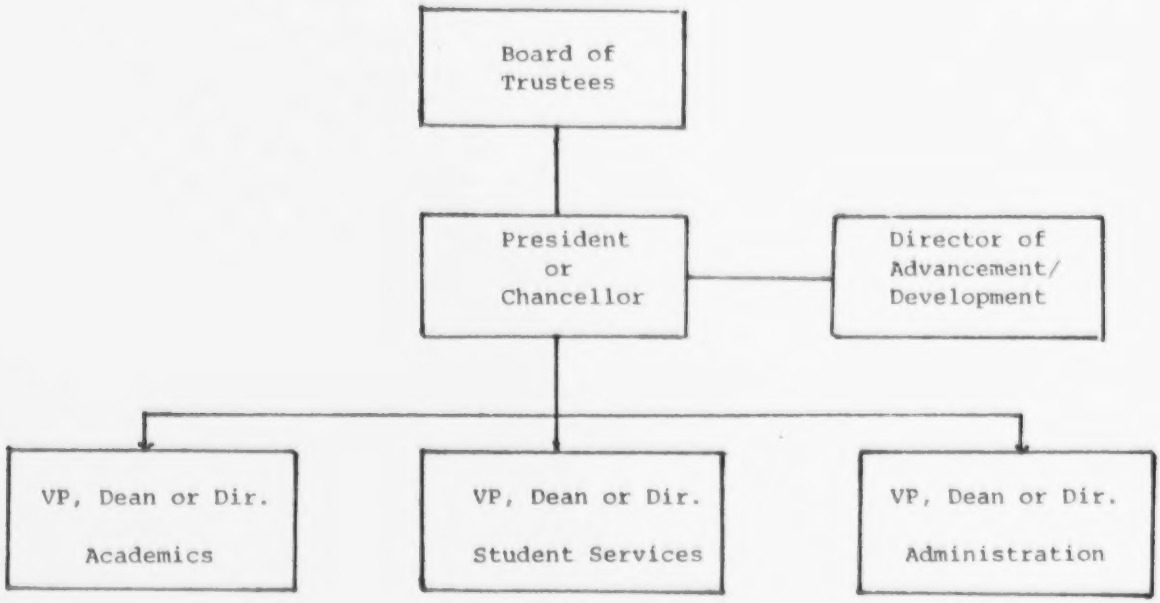
COLLEGE ADVANCEMENT PROGRAM



TYPICAL MODEL OF COLLEGE DEVELOPMENT/ADVANCEMENT FUNCTION

(Staff Model)

Centralized

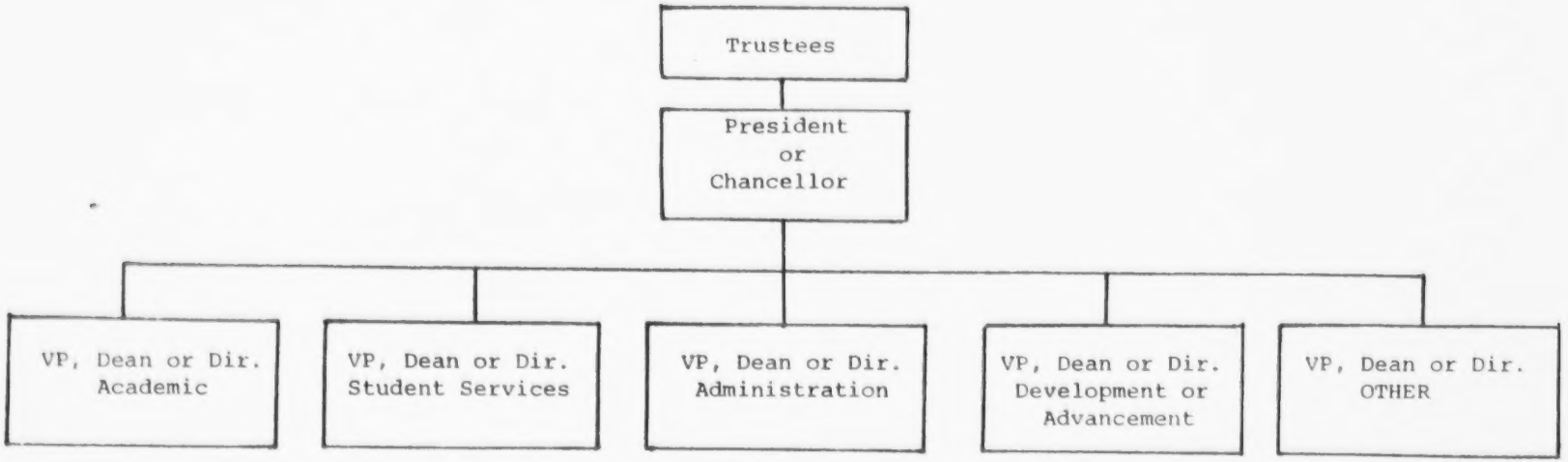

Board of Trustees
President or Chancellor
Director of Advancement/ Development
VP, Dean or Dir. Academics
VP, Dean or Dir. Student Services
VP, Dean or Dir. Administration

This model takes its authority from the truism that the President of the institution is its chief development officer, and therefore that the development/advancement/college relations function is his function which is delegated to staff for implementation.

- In some schools surveyed, the college relations, advancement, and foundation functions are all separate staff positions/functions operating in this manner.
- In several church-affiliated colleges, "Church Relations" is a part of the title of the chief advancement/development officer.

TYPICAL MODEL OF COLLEGE DEVELOPMENT/ADVANCEMENT FUNCTION

(Line Model)


Trustees
President or Chancellor
VP, Dean or Dir. Academic
VP, Dean or Dir. Student Services
VP, Dean or Dir. Administration
VP, Dean or Dir. Development or Advancement
VP, Dean or Dir. OTHER

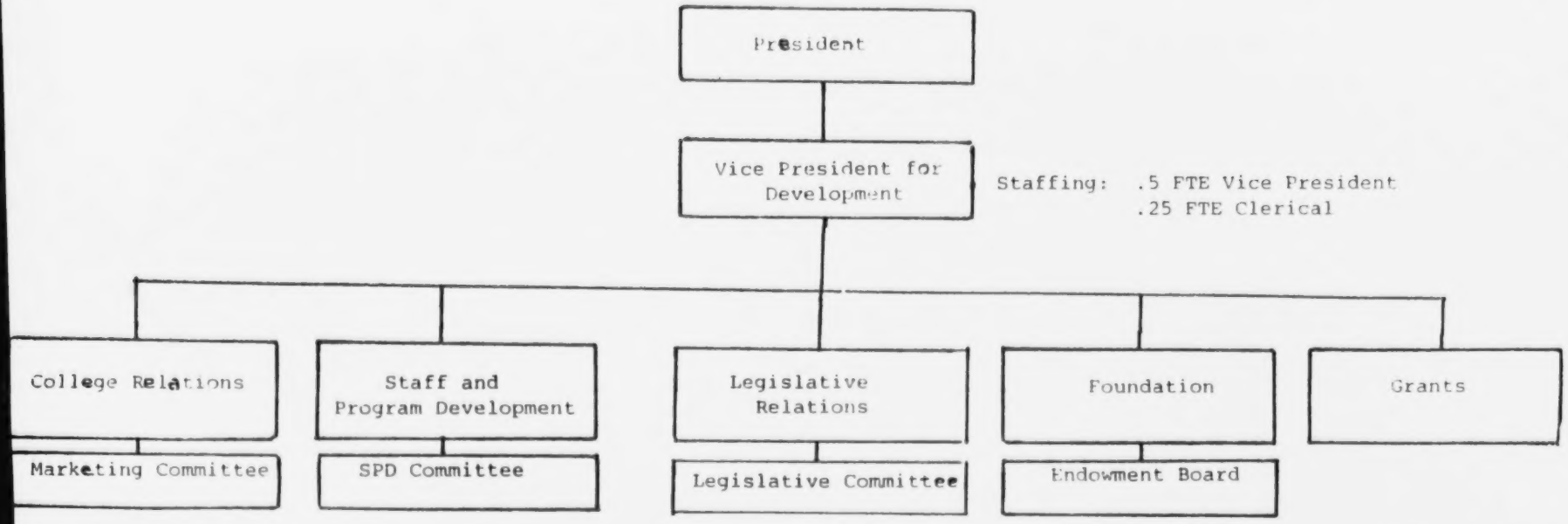
i.e., Church Relations
Planning
Extended Services
College Relations

This model assumes that advancement is an essential partner with the traditional academic/student/administrative branches of college administration, giving it authority and resources along with its other peers.

- In some colleges, Church Relations is also assigned to the line development/advancement officer.
- In 2/3 of the colleges, College or Public Relations is incorporated in the development/advancement area; in remainder these are handled as separate line or staff functions.

Table 6

STRUCTURE OF DEVELOPMENT AREA
EDISON COMMUNITY COLLEGE
(Centralized Line Model)



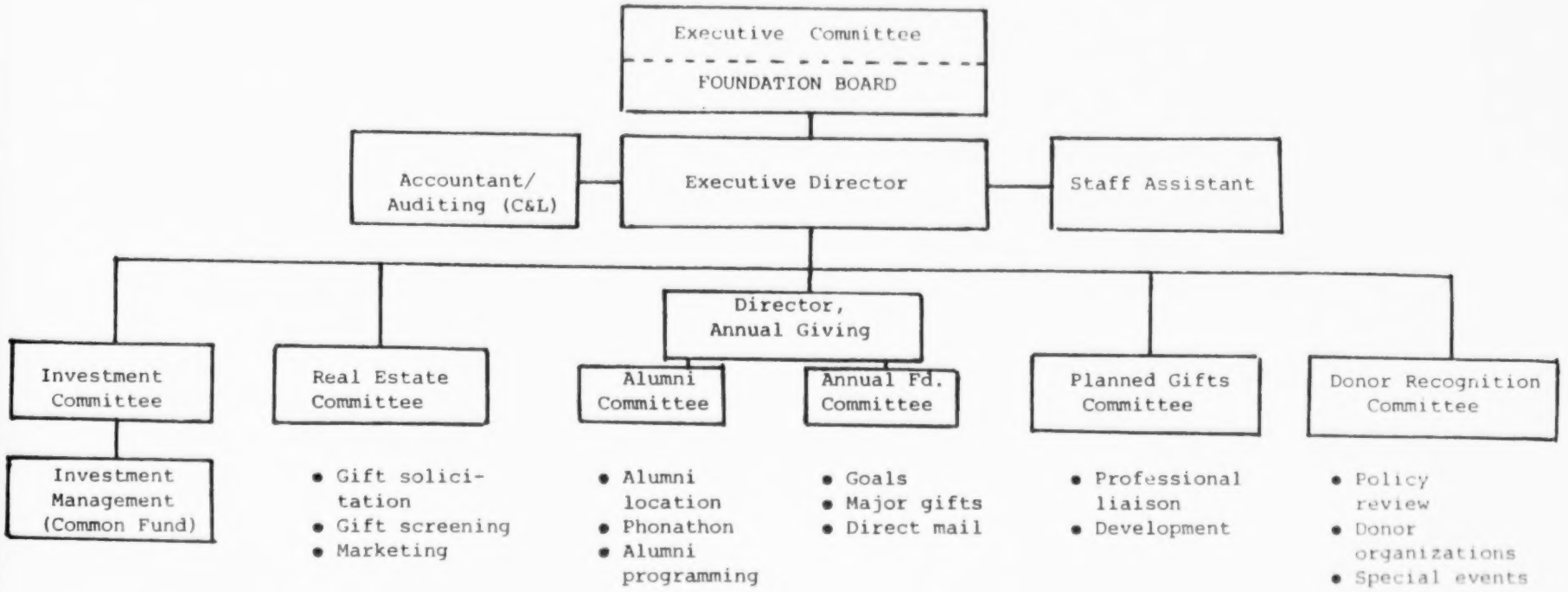
Total Staff: 2.5 Professional
2.5 Clerical

Table 7

FUNCTIONAL

STRUCTURE OF FOUNDATION

EDISON COMMUNITY COLLEGE ENDOWMENT CORPORATION, INC.



Staffing: .5 FTE Executive Director
.5 FTE Director, Annual Giving
.75 Staff Assistant

Contracted: Accounting, auditing, general ledgers - Coopers & Lybrand

Investment management - The Common Fund

Table 8

INVESTMENT MANAGEMENT OF SUCCESSFUL TWO-YEAR COLLEGE FOUNDATIONS / ENDOWMENTS

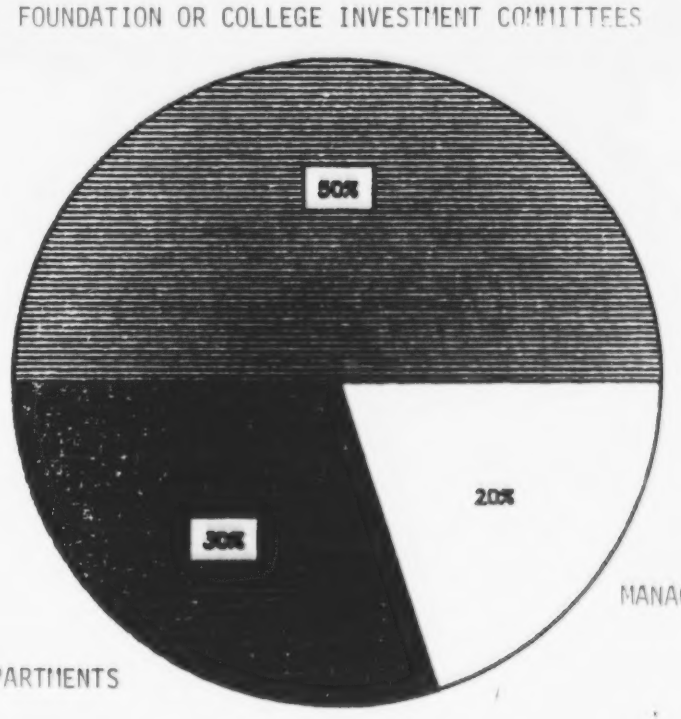
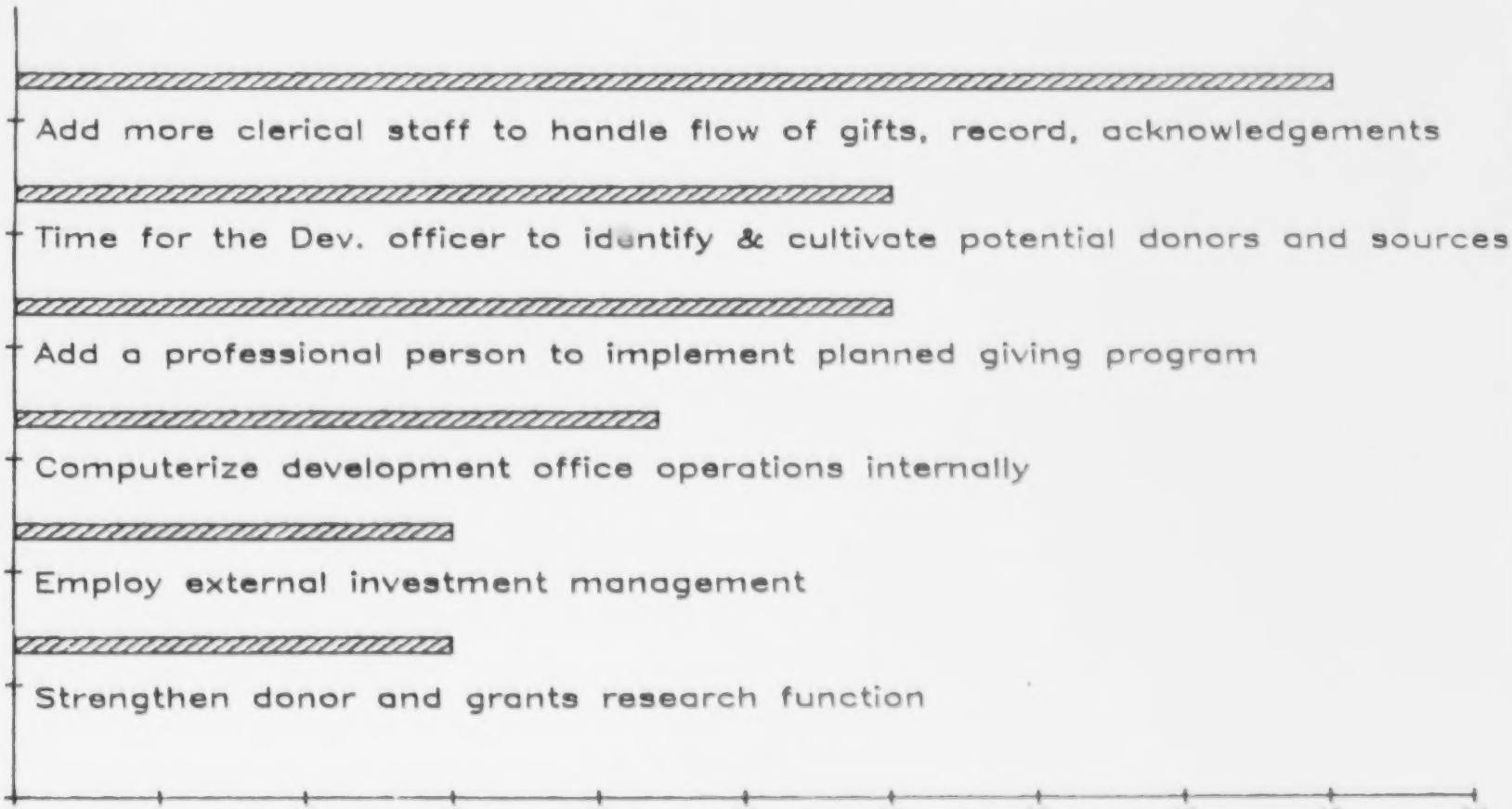


Table 9

ORGANIZATIONAL CHANGES NEEDED TO IMPROVE EFFECTIVENESS OF ADVANCEMENT OFFICE



From October, 1986, survey of two-year public and private colleges

Table 10

SOURCES OF FUNDS INCLUDED IN ENDOWMENTS OF SUCCESSFUL TWO-YEAR COLLEGES/FOUNDATIONS

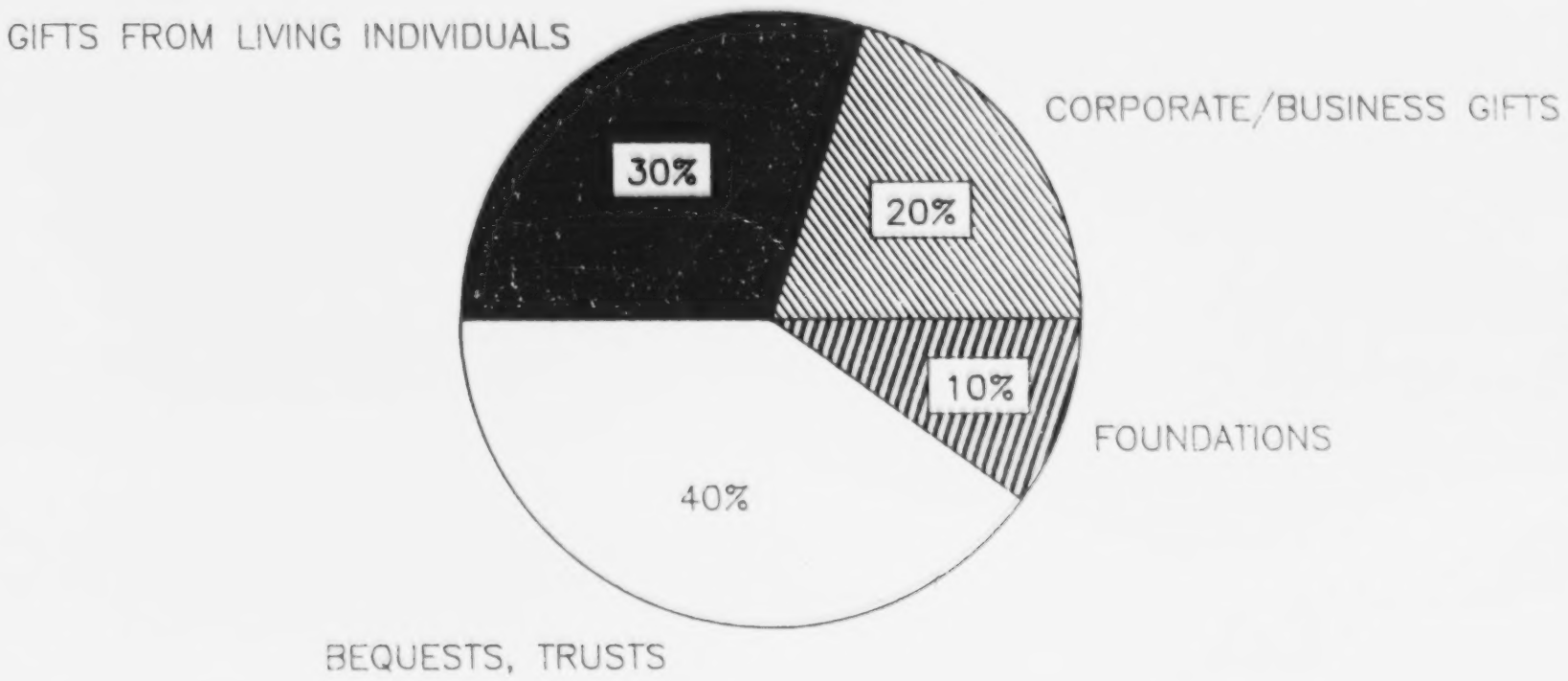


Table 11

CASE

Advancing Two-year Institutions
December 9-11, 1986
Ramada Hotel Old Town
Alexandria, Virginia

Biographical Information on Speaker

Nanette J. Smith
Vice President for Development
Edison Community College
8099 Collge Parkway, S.W.
Fort Myers, FL 33907
[813] 489-9210

Organizational Models of Successful Advancement Programs
(management)

Directed to intermediate and advanced professionals

Mrs. Smith has headed the Edison Community College foundation since its inception in 1975, during which it has generated $3 million in aid to college students and programs, and in addition has built an invested endowment of more than $4 million.

As Vice President for Development at Edison, she also supervises the active college relations and marketing programs, public and private grants, staff and program development and government relations.

She holds degrees from the University of Florida and University of South Florida, and has been active in CASE since its inception in the early 1970's. She is an alumna of the CASE Institute for Senior Development Professionals at Snowmass, and is currently a member of the CASE Two-Year College Advisory Committee.

ERIC Clearinghouse for
Junior Colleges
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